

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE

Schedule No.

2282

Page 1 of 2

Agency

DEPARTMENT OF ASSESSMENTS & TAXATION

Division/Unit

Business Property Valuation -
Utility & Railroad Valuation

Description

Retention

Supersedes Schedule # 1182

1. Railroad Operating Property Return (Form 18)

These reports are filed alphabetically by name of company.

This file, Form 18, consists of a seven page (two sides each page) report (8 1/2" by 11"), filed annually by railroads operating in Maryland. The report consists of various schedules listing property owned in Maryland classified by type of property. In addition, a copy of the Report to the Surface Transportation Board is included, if applicable. Information contained in these reports is used to compute a property tax assessment. The file also contains form AT3-14 (Notice of Assessment).

Retain (5) years, then destroy.

2. Public Utilities Operating Property Return (Form 17)

These reports are filed alphabetically by name of company. This file consists of a report filed by public utilities operating in Maryland. Form 17 (8 1/2" x 11") consists of a two sided, 9 page report. In addition, a copy of the report made to the Federal Energy Regulatory Commission or Maryland Public Service Commission is included, if applicable. Information contained in these reports is used to compute a property tax assessment. This file also contains AT3-14 Notice of Assessment.

Retain (5) years, then destroy

3. Certification of Assessed Values of Public Utilities (Form 205)

These forms are filed alphabetically by County and by Municipality within each county for each tax year. Pages are files in numerical order within each jurisdiction. The Form 205 is a single 8 1/2 x 11 page report. Information on this form is sent to County Finance Offices to notify the County of the assessment of utility operating property. The County uses this information to bill utility companies for property tax.

Retain (5) years, then destroy.

Approved by Department, Agency, or Division Representative.

Schedule Authorized by State Archivist.

Date:

3/25/03

Signature:

Laura Kittel

Type Name:

Laura Kittel

Title:

Program Administrator

Date:

APR 15 2003

Signature:

Edward C. Papenfuss

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE
(Continuation Sheet)**

Schedule No.

2282

Page 2 of 2

Description	Retention
<p>4. <u>Cable Television Property Return. (Form 17-C)</u> These reports are filed alphabetically by name of company. The return consists of a ten (10) page report (8 1/2" x 11") filed annually by cable television companies operating in Maryland. Information contained in these reports is used to compute a personal property tax assessment.</p> <p>The file also contains the Notice of Assessment (Form AT3-12)</p>	<p>Retain (5) years, then destroy.</p>
<p>5. <u>Electric Generation Property Return (Form 17-G)</u> These returns are filed alphabetically by name of company. Returns are filed annually by non-utility electric generating companies operating in Maryland. It consist of a two sided, 9-page report (8 1/2 "x 11"). Information contained in these reports is used to compute a personal property tax assessment. The file also contains the Notice of Assessment (Form AT3-12).</p>	<p>Retain (5) years, then destroy.</p>
<p>6. <u>Certification of Assessed Value of Railroads (Form 205A)</u> These forms are filed alphabetically by County and Municipality within each county for each tax year. Pages are filed in numerical order within each jurisdiction. The Form 205A is a single 8 1/2 x 11 page report. Information on this form is sent to County Finance Offices to notify the County of the assessment of railroad operating property. The county used this information to bill railroad companies for property tax.</p>	<p>Retain (5) years, then destroy.</p>

INSTRUCTIONS - TYPE OR PRINT A SEPARATE FORM FOR EACH NEW REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)		DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD P.O. BOX 275 - JESSUP, MARYLAND 20794		AGENCY RECORDS INVENTORY Page <u>1</u> Of <u>1</u>	
1. DEPARTMENT/AGENCY <u>Assessments & Taxation</u>		2. DIVISION <u>Business Property Valuation</u>		3. UNIT <u>Utility & Railroad Valuation</u>	
DEFINITION - Records Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.					
4. RECORD SERIES TITLE <u>Electric Generation Property Return</u>				5. EARLIEST YEAR / LATEST YEAR <u>2000 to 2002</u>	
6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series. Include the purpose or function of the Series) <u>Returns are filed annually by non-utility electric generating companies operating in Maryland. It consists of a two-sided, 9 page report (8 1/2 x 11). Information contained in these reports is used to compute a personal property tax assessment. The file also contains the Notice of Assessments (Form AT 3-12).</u>					
7. RECORD SERIES FORMAT(S) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (Specify) _____		8. RECORD SERIES SEQUENCE <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (Specify) _____		9. VOLUME <input checked="" type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (Specify) _____ Number <u>1</u>	
11. FILE IS USED <input type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Monthly		12. FILE BECOMES INACTIVE AFTER <u>5</u> Number <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s)			
13. CURRENT LOCATION(S) (Bldg., Floor, Room) <u>300 W. Preston St.</u> <u>6th Floor Rm 600</u>		14. IS RECORD SERIES DUPLICATED ELSEWHERE? (If yes, specify agency or office) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
15. ACCESS RESTRICTIONS (If yes, cite law(s) & regulation(s)) <input checked="" type="checkbox"/> Yes <u>Tax-Property 2-213</u> <input type="checkbox"/> No		16. AUDIT REQUIREMENTS <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent			
17. IS AN INDEX SYSTEM USED? (If yes, explain briefly and describe any hardware/software) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		18. RECOMMENDED RETENTION <u>Retain 5 years, then destroy.</u>			
19. NAME AND TITLE OF PREPARER <u>Laura Kittel</u> <u>Program Manager</u>		20. TELEPHONE NUMBER <u>410-767-1940</u>		21. DATE <u>3-21-03</u>	

INSTRUCTIONS - TYPE OR PRINT A SEPARATE FORM FOR EACH NEW REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)		DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD P.O. BOX 275 - JESSUP, MARYLAND 20794		AGENCY RECORDS INVENTORY Page <u>1</u> of <u>1</u>	
1. DEPARTMENT/AGENCY <u>Assessments & Taxation</u>		2. DIVISION <u>Business Property Valuation</u>		3. UNIT <u>Utility & Railroad Valuation</u>	
DEFINITION - Records Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.					
4. RECORD SERIES TITLE <u>Certification of Assessed Values of Railroads</u>				5. EARLIEST YEAR / LATEST YEAR <u>2001 TO 2002</u>	
6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series. Include the purpose or function of the Series) <u>The form is a single 8 1/2 x 11 page report. Information on this form is sent to County Finance Offices to notify the County of the assessment of railroad operating property. The county uses this information to bill railroad companies for property tax.</u>					
7. RECORD SERIES FORMAT(S) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (Specify) _____		8. RECORD SERIES SEQUENCE <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (Specify) _____		9. VOLUME <input checked="" type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (Specify) _____ Number <u>1</u>	
11. FILE IS USED <input type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Monthly		12. FILE BECOMES INACTIVE AFTER <u>5</u> Number <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s)			
13. CURRENT LOCATION(S) (Bldg., Floor, Room) <u>300 W. Preston St.</u> <u>6th Floor Rm 600</u>		14. IS RECORD SERIES DUPLICATED ELSEWHERE? (If yes, specify agency or office) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
15. ACCESS RESTRICTIONS (If yes, cite law(s) & regulation(s)) <input checked="" type="checkbox"/> Yes <u>Tax-Property 2-2120</u> <input type="checkbox"/> No		16. AUDIT REQUIREMENTS <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent			
17. IS AN INDEX SYSTEM USED? (If yes, explain briefly and describe any hardware/software) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		18. RECOMMENDED RETENTION <u>Retain 5 years, then destroy.</u>			
19. NAME AND TITLE OF PREPARER <u>Laura Kittel</u> <u>Program Manager</u>		20. TELEPHONE NUMBER <u>410-767-1940</u>		21. DATE <u>3-21-03</u>	

1. DEPARTMENT/AGENCY

Assessments + Taxation

2. DIVISION

Business Property

3. UNIT

Utility +
Railroad valuation

DEFINITION - Records Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

4. RECORD SERIES TITLE

Cable Television Property Return

5. EARLIEST YEAR / LATEST YEAR

1991 TO Present

6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series. Include the purpose or function of the Series)

See Item # 4 on schedule

7. RECORD SERIES FORMAT(S)

- ☒ Letter Size ☐ Microfilm
☐ Legal Size ☐ Computer Tape
☐ Bound Book ☐ Floppy Disk
☐ Audio Tape ☐ Video Tape
☐ Other (Specify) _____

8. RECORD SERIES SEQUENCE

- ☐ Alphabetical
☐ Numerical
☐ Chronological
☐ Geographical
☒ Other (Specify) Alphabetical + then
by year

9. VOLUME

- ☒ File Drawer(s)
☐ Microfilm Reel (s)
☐ Computer Tape (s)
☐ Other (Specify) _____

4
Number

10. ANNUAL ACCUMULATION

- ☒ File Drawer (s)
☐ Microfilm Reel (s)
☐ Computer Tape(s)
☐ Other (Specify) _____

1
Number

11. FILE IS USED

- ☐ Daily ☐ Weekly ☒ Monthly

12. FILE BECOMES INACTIVE AFTER

2 ☐ Month(s) ☒ Year(s)
Number

13. CURRENT LOCATION(S) (Bldg., Floor, Room)

Room 600 File Room

14. IS RECORD SERIES DUPLICATED ELSEWHERE? (If yes, specify agency or office)

☐ Yes ☒ No

15. ACCESS RESTRICTIONS (If yes, cite law(s) & regulation(s))

☒ Yes Tax Property ☐ No
2-212

16. AUDIT REQUIREMENTS

☒ None ☐ State ☐ Federal ☐ Independent

17. IS AN INDEX SYSTEM USED? (If yes, explain briefly and describe any hardware/software)

☐ Yes ☒ No

18. RECOMMENDED RETENTION

5 years, then Destroy

19. NAME AND TITLE OF PREPARER

Celestine Knight

20. TELEPHONE NUMBER

(410) 767-1196

21. DATE

3-25-03